MedEd Software Implementation Checklist

Use this checklist to ensure your team is fully prepared for a successful software rollout:

1. Define Your Vision and Success Criteria

○ Document the outcomes you want to achieve (e.g., streamline MSPE, enhance curriculum tracking)

○ Share your vision statement with internal stakeholders and your vendor

2. Assign a Strategic Implementation Lead

○ Choose a lead who understands your workflows and institutional structure
○ Ensure they have bandwidth and authority to coordinate across teams

3. Engage the Right Stakeholders Early

○ Identify decision-makers, faculty leads, and IT/data contacts
○ Schedule joint planning sessions before implementation begins

4. Build a Detailed Implementation Plan

- ◯ Define milestones, deliverables, and training schedules
- ◯ Agree on timelines and expectations with your vendor partner
- ◯ Set weekly or biweekly check-in meetings

5. Block Time for Learning and Data Entry

- ◯ Allocate calendar time post-training for hands-on system use
- ◯ Assign data migration or entry responsibilities to specific roles

6. Plan Training and Adoption Beyond the Core Team

- ◯ Decide training formats: live group, 1:1, recorded, or self-paced
- ◯ Create or collect role-based support materials
- ◯ Monitor adoption and support needs after go-live

7. Set a Process for Continuous Quality Improvement (CQI)

- ◯ Establish a post-launch optimization plan
- ◯ Use support check-ins to surface challenges and feature opportunities
- ◯ Invite your team to participate in product feedback or roadmap discussions

Pro Tip:
Use this checklist as a planning document to review during your kickoff meeting and revisit throughout implementation. The most successful teams treat it as a living document.